

COLORADO STATE ARCHIVES - SCHOOL DISTRICT RECORDS

SCHEDULE 2

GENERAL ADMINISTRATIVE RECORDS

General Description: Records generally relating to the administration and direction of the school district's various programs. *The specified retention period applies to the information contained within the record, regardless of the physical format of the record (paper, microfilm, computer disk or tape, optical disk, etc.).*

Duplicate Copies: Provided that no retention period is specified for duplicate copies, retain those that are created for **administrative purposes** for 1 year, and retain those created for **convenience or reference purposes** until no longer needed or for 1 year, whichever is first. Duplicate copies should not be retained longer than the record copy.

1. **AFFIDAVITS OF PUBLICATION** – proof of publication provided by newspapers that are required of the school district's such as budget, board meetings and other special notices

Retention: 6 years

2. **AGREEMENTS and CONTRACTS** of various kinds that document some form of agreement or contract that is enforceable by law between the school district and other parties regarding leases, franchises, professional services and other ones that the school district should enter in to.

Retention: Duration of the agreement or contract plus 6 years, to include any terms limiting action there under

3. **ANNUAL REPORT** of the school district to the Board of Education and/or citizens of the district.

Retention: Permanent

4. **AWARDS and HONORS** that the district has received from various public or private sources.

Retention: Permanent

5. **COMMITTEE RECORDS – Internal** that document the actions and decisions of various committees, task forces or other special school sanctioned groups that meet on an ongoing basis or are established for a specific purpose. Some

examples of these would be textbook review, school lunch program and the parent – school resource groups.

a. Ongoing Committees

Retention: 2 years, provided records have no long-term value

b. Specific Purpose Committees

Retention: Until work of the committee ends and there is no long-term value.

6. **COMPLAINTS** - communications that are received from parents and/or other persons regarding objections, dissatisfactions or disagreement with school district policies or actions.

Retention: 2 years after response or action by the school district, and all rights of appeal have been exhausted

7. **CORRESPONDENCE – ROUTINE** is written communication that is sent or received by one or more individuals via the US mail, private courier, facsimile transmission or electronic mail. The information contained in this type of correspondence is general in nature and does not convey district policy or legal/fiscal positions.

Retention: 2 years

8. **CORRESPONDENCE – LEGAL, FISCAL, POLICY** – this written communication is sent in the same manner as the routine correspondence, but its' value is important to the school district by the very nature of its' subject matter. Examples of this type of correspondence are communications dealing with district fiscal policy, legal issues, property records, court filings and other topics that may be needed for future use.

Retention: Permanent

9. **ELECTRONIC MAIL** is an electronic message that is transmitted between two or more computers or electronic terminals.

Retention: Follow the School District's E-mail Policy

10. **FORMS – BLANK** that are not considered to be records and should be separated from the school district's records. However, a master forms file may be

maintained to track the evolution of the form and instructions regarding use of the form.

Retention: Until superseded, except retain one copy permanently if a master forms file is maintained

11. **GENERAL ADMINISTRATIVE RECORDS** that are created or received in the course of administering programs, including daily, weekly or monthly activity reports which are summarized in the district's annual report

Retention: 2 years or until no longer needed for reference

12. **HOUSEKEEPING FILES** that are maintained by an office and that do not relate directly to the primary educational mission of the office. Includes such records as charity fund drives, office parties, custodial service requests, parking space assignments, telephone and fax logs and distribution of keys.

Retention: Until no longer needed for reference

13. **MAIL & POSTAGE RECORDS** that record the amounts of mail dispatched, the cost center to be charged and the total amounts of postage charged.

Retention: 2 years

14. **MINUTES OF THE SCHOOL BOARD** that serve as the official record of the actions and decisions of the school district

Retention: Permanent

15. **MAPS & DRAWINGS** that relate to building construction and/or remodeling, site plans, engineering, cartographic or other graphic presentations that are needed for the continued operation of the school district and its facilities.

Retention: Permanent

16. **NEWS RELEASES** that are prepared statements or announcements issued to the news media regarding school board decisions, changes in senior administrative personnel, and or program changes or termination of specific school programs. It should be noted that major policy or historical news releases should be retained indefinitely.

Retention: 4 years

17. **POLICY and PROGRAM DEVELOPMENT RECORDS** that document the formulation and adoption of policies, procedures and functions of the school district. Includes narrative and/or statistical reports, related correspondence on program activities, organizational charts and records related to significant events in which the school district participated.

Retention: Permanent

18. **PUBLICATIONS** that are produced for wide internal or external distribution, including district brochures, pamphlets, studies, proposals, newsletters, proposed instructional materials, and similar materials produced and made available to the public. One copy should be retained permanently and extra copy destroyed.

Retention: Permanent

19. **REPORTS (Daily, Monthly, Quarterly)** that are prepared by various school district departments regarding the educational operation and/or activities, and are for use in compiling other reports, planning and budgeting, monitoring academic achievement and progress, etc....

Retention: 3 years

20. **RESOLUTIONS OF THE SCHOOL BOARD** that relate to the school district's endorsement of a position, action or policy on a given topic such as supporting a statewide referendum on school funding.

Retention: Permanent

21. **RULES & REGULATIONS** adopted by the school board in relation to various school activities and functions. Examples of these would be to protect students and staff, set standards of conduct and dress, and provide accountability to the taxpayers.

Retention: Permanent

22. **STUDIES & PLANS** prepared by the school district or contractors for the district. Examples include feasibility studies, planning and land use, population

estimates, educational achievement, capital projects, transportation projections and other documents that have long-term reference or historical value to the school district.

Retention: Permanent

23. **SURVEYS & QUESTIONNAIRES** or other similar documents used by the district to evaluate or gain feedback from students and citizens.

Retention: Until no longer needed for administrative or educational purposes

24. **TRAINING & CONFERENCE MATERIALS** that document school employees at seminars, conferences or other training events not sponsored by the school district, including instructional materials obtained at these meetings or training sessions.

Retention: 2 years

25. **WORKSHEETS & DRAFTS** such as rough notes, calculations or drafts assembled or created and used to prepare or analyze other documents; records of preliminary or working stage which are used in preparation of the final version or a document or report.

Retention: Until no longer needed